FP TRANSITIONS®

LISTING 20-316

LOCATION	REVENUE	ASKING
Texas	$305,898	$800,000

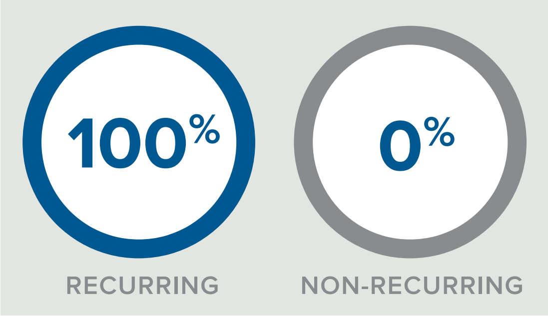
This RIA takes a hands-on, holistic approach to financial planning and investment management with a focus on servicing the individual needs of each of its 44 households comprised of retirees and pre-retirees in the Dallas, Texas, metro area. Trailing 12 months' revenue for this practice is over $300,000, all of which is recurring fee-based revenue from approximately $43 million in managed assets. This RIA does use a third-party asset manager for approximately 80% of the managed assets.

The ideal buyer for this practice would be a well-established RIA that is focused on understanding the unique needs and goals of its current clients and can continue to provide this practice's clients with the same level of service they have come to expect. The principal of this practice seeks to fully retire within one year of the clients being transitioned.

PRACTICE INFORMATION

Assets Under Advisory	$42,657,000
Assets Under Management	$42,657,000
Households	44
Form of Ownership	LLC
Total Number of Employees	1

REVENUE



INQUIRE NOW

Visit **fptransitions.com/20-316-inquire** or log in to your member dashboard to inquire.

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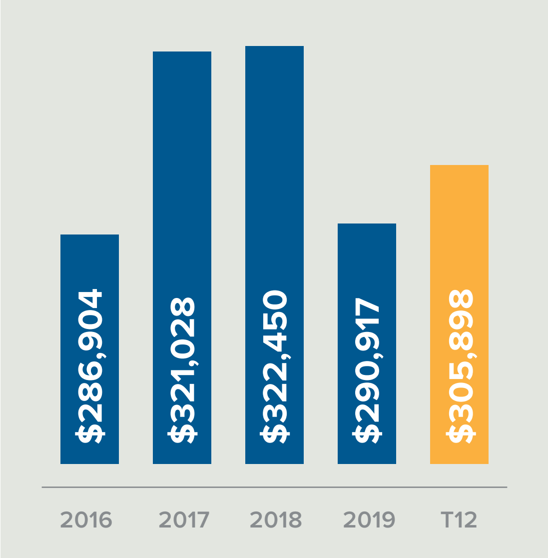
HISTORICAL REVENUE



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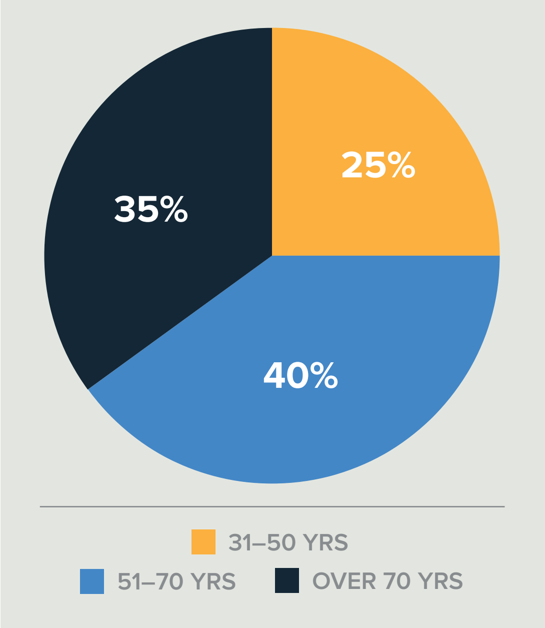
SELLER INFORMATION

Licenses	7, 24, 51, 63
Education	JD
Years in Business	18
Years in Industry	25
Seller's Age Range	50–60

SOURCES OF REVENUE

	RECURRING REVENUE	NON-RECURRING REVENUE
FEE-BASED		
Fees from AUM	$65,165	
Third-Party Assets	$240,733	
TOTALS		
	$305,898	

CLIENT DEMOGRAPHICS



REVENUE SOURCES